



FY 2024 CMF AWARD

AMIS INSTRUCTIONS FOR THE AWARD RECORD AND ASSISTANCE AGREEMENT

OCTOBER 9, 2024

CDFI FUND
U.S. DEPARTMENT OF THE TREASURY

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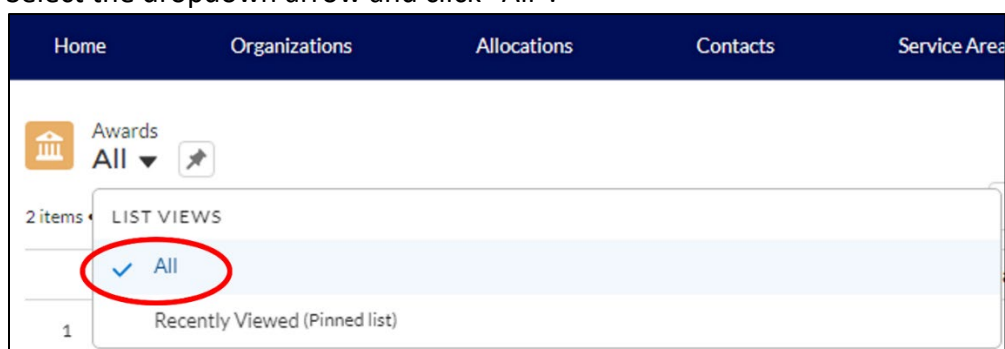
1. Viewing the Award record and Assistance Agreement

You can access view your organization's FY 2024 CMF Award record and Assistance Agreement in AMIS by following the instructions below:

- 1) Log in to your organization's AMIS account and click on the "Awards" tab.



- 2) Select the dropdown arrow and click "All".



- 3) Click on the "Award Name" link of your FY 2024 CMF Award.

Note: the link will start with AWD-000####.

The screenshot shows the AMIS Awards table. The table has columns for Award Name, Organization, Award Control, Award Year, and Award Period. The row for AWD-00012266 is highlighted with a red box.

	Award Name ↑	Organization	Award Control ...	Award Y...	Award P...
1	AWD-00007789	Test Applicant Org 28	123123	2017	
2	AWD-00012235	Test Applicant Org 28	21TEST58945	2021	CMF
3	AWD-00012236	Test Applicant Org 28	16TEST20184	2016	CMF
4	AWD-00012237	Test Applicant Org 28	17TEST22241	2017	CMF
5	AWD-00012238	Test Applicant Org 28	18TEST50489	2018	CMF
6	AWD-00012239	Test Applicant Org 28	19TEST53366	2019	CMF
7	AWD-00012240	Test Applicant Org 28	20TEST55255	2020	CMF
8	AWD-00012266	Test Applicant Org 28	241CM065367	2024	CMF
9	AWD-00012285	Test Applicant Org 28	241CM065367	2024	CMF

- 4) On the Award page, click the “Related” tab. Navigate to the Notes & Attachments related list.

 Award
AWD-00012266

[Edit](#) [Payment Request](#) [Printable View](#)

[Detail](#) **Related**

Organization
[Test Applicant Org 28](#)

Award Name
AWD-00012266


Award Year
2024

Award Program:
CMF


Entity Type
Affordable Housing Developer/Manager


CDFI Certification Status
Not Certified


- 5) Click on the link to the Assistance Agreement PDF. After opening the attachment you will be able to download and save a copy of the Assistance Agreement.


 Award
AWD-00012266


[Detail](#) **Related**


 Payment Requests (0)


 Award Geographic Areas (0)


 Forms of Award (0)


 SF-425 (0)

 Service Requests (0)

 Open Activities (0)

 Activity History (0)

 **Notes & Attachments (1)**

 [CMF Assistance Agreement 241CM065367.pdf](#)
Oct 8, 2024 • Attachment

2. Requesting a Modification to the Assistance Agreement

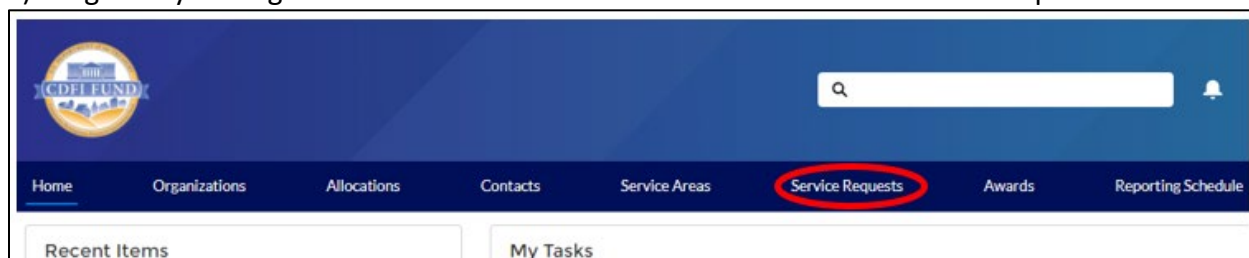
Recipients should complete the steps outlined below to request a modification to the Assistance Agreement, if applicable. Please carefully review the *FY 2024 CMF Award Transmittal Letter* for more details on the types of modification requests that the CDFI Fund will consider and deadlines for modification requests.

Note: Recipients that do not wish to request a modification to their CMF Assistance Agreement should skip to the next section - [Signing the Assistance Agreement and uploading the Certificate of Good Standing](#).

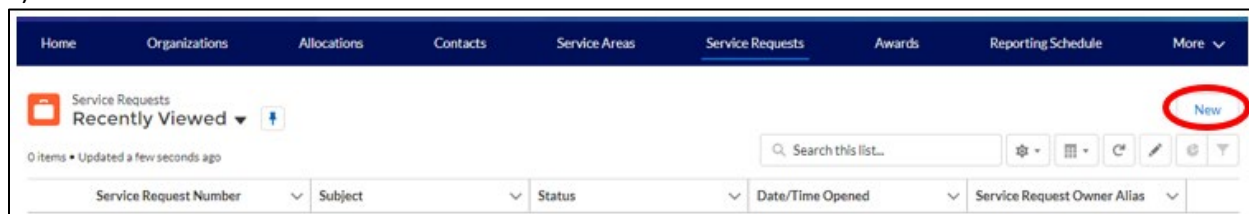
Recipients that submit an Assistance Agreement modification request should **NOT** sign the Assistance Agreement until after the CDFI Fund has provided a decision on the modification request and, if applicable, generated an updated Assistance Agreement. The CDFI Fund will notify you of the modification request decision via the AMIS Service Request you created in submitting your modification request.

To request a modification:

- 1) Log in to your organization's AMIS account and click on the the "Service Requests" tab.



- 2) Click on the "New" button.



- 3) Select “Capital Magnet Fund” from the Program dropdown menu and “Modifications (pre-closing)” from the Program Topic dropdown menu. Enter the Award Number for your FY 2024 CMF Award, which starts with “AWD-000####” in the Award field.

New Service Request: General Inquiry

* = Required Information


Service Request Information

Service Request Owner
TestUser Org01POC01

Funding Application ⓘ
Search Funding Applications... 🔍

Service Request Number

Award

 AWD-00010624 ✕

Contact Name

Validated
--None-- ▼
[View all dependencies](#)

Organization Name

* Program
Capital Magnet Fund ▼

Program Topic
Modifications (pre-closing) ▼

- 4) Enter “Assistance Agreement Modification Request” in the “Subject” field. Please include a detailed written justification for your modification request in the “Description” field. When you are done, press “Save.”

The screenshot shows a web form titled "New Service Request: General Inquiry". It contains several dropdown menus and text fields. The "Status" dropdown is set to "New". The "Service Request Origin" dropdown is set to "Web". The "Priority" dropdown is set to "Medium". The "Subject" text field contains "Assistance Agreement Modification Request". The "Description" text field contains "Detailed written justification for your modification request". A red rectangle highlights the "Subject" and "Description" fields. At the bottom right, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is circled in red.

The written justification for the modification request(s), should give the CDFI Fund enough information to make a decision on whether or not to accept or deny the modification request. If the justification and supporting documentation (if applicable) is not sufficient, the CDFI Fund will request additional information and supporting documentation, which may delay the timing of closing on your CMF Assistance Agreement.

Types of Eligible Modifications:

- Signature Page Corrections and Fiscal Year End date changes
 - Include supporting documentation such as Articles of Incorporation for Organization Name corrections and Board Resolutions for Fiscal Year End date changes.
 - Note – Changes to Fiscal Year End dates will also require a [Certification of Material Events Form](#) to be submitted to the CDFI Fund via a Service Request.
- Payment Amount Changes
 - Provide a brief explanation for why your organization is requesting the change and be sure that the requested amounts reconcile with your FY 2024 CMF Award amount.
- Service Area Geographies

- Provide an explanation for what has changed since your Organization submitted its FY 2024 CMF Application that has resulted in your organization wishing to make changes to the Service Area Geographies. If requesting to add a new a Service Area Geography, please include information on your Organization’s track record and pipeline in that area.
- 5) Do not sign your Assistance Agreement until the CDFI Fund notifies you via your AMIS Service Request (Modification Request) that a decision has been made, and if applicable, the CDFI Fund has generated a modified Assistance Agreement.

3. Signing the Assistance Agreement and uploading the Certificate of Good Standing

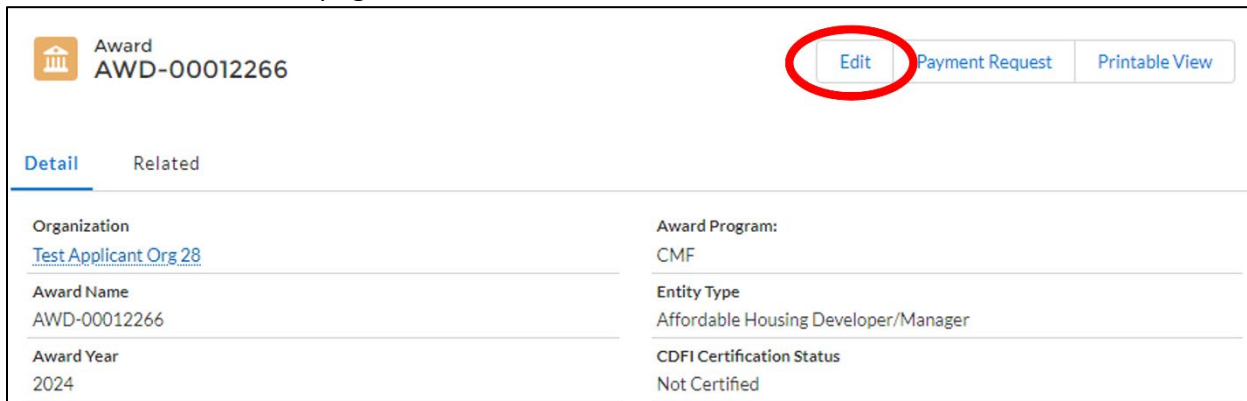
Please note that the Assistance Agreement (AA) must be signed electronically, in AMIS, by a contact that is designated as an “Authorized Representative” (AR) on your organization’s AMIS account. This Authorized Representative must be duly authorized by your organization to enter into legally binding documents on behalf of your organization. As such, consultants are not bona fide Authorized Representatives and thus cannot execute Assistance Agreements on behalf of their client organizations (i.e., the Recipient). The “Auth. Rep. Signature Title”, which is the title reflected on the Authorized Representative’s contact record in AMIS, must reflect the title of a leadership position and the incumbent authority to sign legally binding documents on behalf of the organization.¹ Please see [Appendix A](#) for a list of Authorized Representative titles that the CDFI Fund deems acceptable.

An Authorized Representative with authorization to sign legal documents on behalf of your organization must complete the steps outlined below to review and electronically sign the Assistance Agreement as well as upload the Certificate of Good Standing (COGS), if applicable. Please carefully review the *FY 2024 CMF Award Transmittal Letter* for more details on reviewing, signing, and submitting the Assistance Agreement including key deadlines.

IMPORTANT: Please **DO NOT** complete any of the Assistance Agreement signature checkboxes if you do not have the authority to sign legal documents on behalf of your organization. Doing so will delay the CDFI Fund in finalizing your organization’s Assistance Agreement and initiating the award payment.

¹ To add or update organization contacts see Section 6.3 of the [AMIS Training Manual](#).

- 1) Follow the [Viewing the Award record and Assistance Agreement](#) steps above to access your FY 2024 CMF Award. When you are on the Award record detail page, click the “Edit” button on the Award Detail page.



Award AWD-00012266

[Edit](#) [Payment Request](#) [Printable View](#)

[Detail](#) [Related](#)

Organization	Award Program:
Test Applicant Org 28	CMF
Award Name	Entity Type
AWD-00012266	Affordable Housing Developer/Manager
Award Year	CDFI Certification Status
2024	Not Certified

2) Skip all sections that say “(CMF Recipients: DO NOT complete this section)”

- 3) Read the System for Award Management (SAM) Attestation language and click the “SAM Attestation Signed” checkbox to confirm that your organization’s SAM account is active and up to date. If your organization is unsure about the status of its SAM account, please utilize the [SAM.gov Status Tracker](#) to verify that its account is active. Note: Recipients must complete this step in order to complete Step 5 below.

System for Award Management (SAM) Verification

SAM Attestation

By selecting this checkbox I confirm that within the past 14 days I have verified that my organization's System for Award Management (SAM) account is active and the bank account information in SAM is up to date. I acknowledge that I am responsible for the accuracy of the banking information in my organization's SAM account and understand that receipt of an award payment will be significantly delayed if the bank account information in SAM is incorrect.

SAM Attestation Signed

☒

- 4) Read the “Program Goals and Measures and Webinar Attestation (CMF & ERP Recipients Only)” and click the checkboxes to confirm that you have read and understand the Performance Goals and Measures and that a representative of your organization has either attended the *Getting to Know Your FY 2024 CMF Assistance Agreement* webinar on November 13, 2024 or watched the recording post on the CMF [Step 4: Closing and Disbursement Page](#).

IMPORTANT: Please **DO NOT** complete any of the checkboxes on the Award record in AMIS until after a representative of your organization has attended the *Getting to Know Your FY 2024 Assistance Agreement* webinar scheduled for November 13, 2024, or viewed the recording that will be posted the CMF [Step 4: Closing and Disbursement](#) webpage after November 13, 2024. Completing the signature checkboxes prior to attending the webinar will result in a validation error in AMIS and may delay the CDFI Fund in finalizing your organization's Assistance Agreement and initiating the award payment process.

Program Goals and Measures and Webinar Attestation (CMF & ERP Recipients Only)

PGM Attestation
By selecting this checkbox I confirm that I have read and understand the Performance Goals and Measures in my organization's Assistance Agreement.

PGM Attestation Signed
☒

Webinar Attestation
By selecting 'Yes' I confirm that a representative of my organization has either attended the live webinar or watched the recording of the CMF Getting to Know Your Assistance Agreement presentation.

Webinar Signed
☒

- 5) Read the Signature Attestation language. An AMIS Contact designated as an Authorized Representative in the Organization Profile must click the “Auth. Rep Signature” checkbox to electronically sign the Assistance Agreement. Click “Save”. Consultants are not allowed to sign CDFI Fund Assistance Agreements on behalf of their clients.

Agreement Authorized Representative Signature

Signature Attestation
By selecting the checked box: I hereby consent to conducting this transaction by electronic means, and I hereby agree that I have executed an electronic process that constitutes, and delivers to the CDFI Fund, my electronic signature; I hereby agree that this electronic signature shall be treated as an original signature for the purpose of having signed the Agreement that is currently uploaded in the CDFI Fund's Award Management Information System (AMIS), and as evidence that the Recipient agrees to and is bound by all the covenants, conditions, and agreements therein contained, just the same as a pen-and-paper signature; I hereby consent and agree to affixing a representation of this electronic signature to the signature page of the Agreement as further evidence that the Recipient agrees to and is bound by all the covenants, conditions, and agreements therein contained; I hereby certify that I am the Authorized Representative of the Recipient and am duly authorized by the Recipient to execute and deliver the Agreement on behalf of the Recipient; I hereby acknowledge that all information contained in this Agreement and any attachments or supplements thereto will be subject to disclosure pursuant to the Freedom of Information Act (FOIA) 5 USC 552, et seq.; I hereby certify that all of the information that the Recipient has provided in this Agreement is true, correct, and complete; I hereby certify that the execution and submission of this Agreement has been duly authorized by the governing body of the Recipient; and I hereby certify that I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties (U.S. Code, title 218, Section 1001).

Auth. Rep Signature
☒

Authorized Representative Signature

Cancel Save

- 6) If the Table of Contents in your organization's Assistance Agreement indicates that a Certificate of Good Standing (COGS) or Legal Opinion is required, you must attach the document to the Notes & Attachments related list in the award record Related page. **Please follow this Naming Convention when uploading your document in AMIS: Org Name_Document Type(COGS or Legal Opinion)_Date of Document(MM.DD.YYYY).**



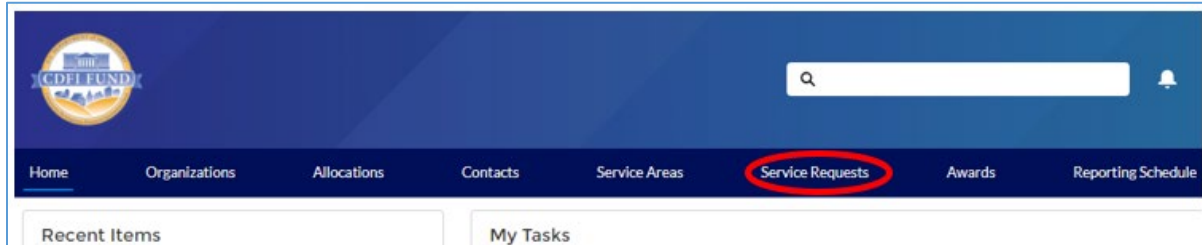
IMPORTANT: The CDFI Fund is unable to move forward processing your Award for payment until the Assistance Agreement is signed, and the COGS or Legal Opinion is provided, if required.

Note: At this point, no further action is needed from your organization. **Skip all sections that are annotated as: “(CMF & ERP Recipients: DO NOT complete this section)”**. After electronically signing the Assistance Agreement and uploading your COGS or Legal Opinion, if applicable, the CDFI Fund will conduct a review to ensure your organization is in compliance with the terms of any other CDFI Fund awards and allocations. If no issues arise during the CDFI Fund compliance review, the CMF Program Manager will electronically countersign the Assistance Agreement. Recipients typically receive funds within 5-10 business days after the Assistance Agreement is countersigned by the Program Manager.

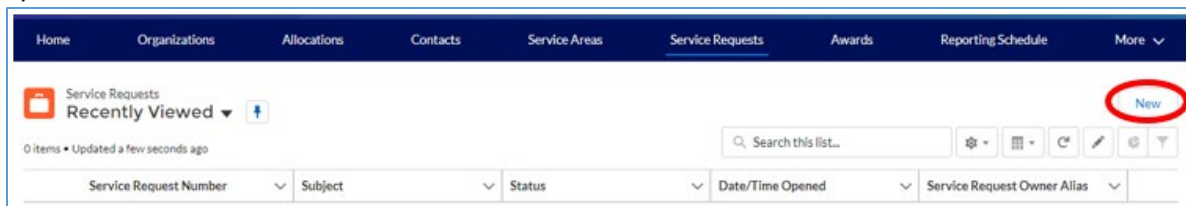
4. Submitting a question to the CMF Program Team via an AMIS Service Request

The most efficient way to contact the CMF Program Team with any questions about the Assistance Agreement or closing process is to submit a Service Request in AMIS. Follow the steps below so that your request is correctly routed to the CMF Program Team:

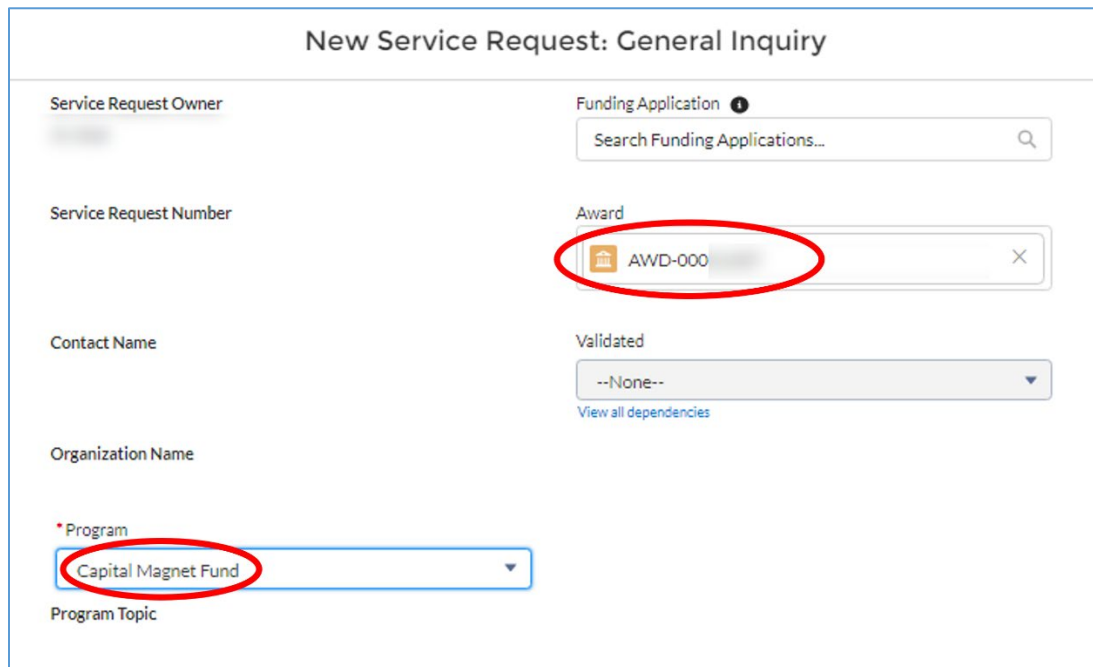
- 1) Log in to your organization's AMIS account and click on the "Service Requests" tab.



- 2) Click on the "New" button.



- 3) Select "Capital Magnet Fund" in the Program field. Enter the Award Number, which starts with "AWD-0000####" in the Award field.

A screenshot of the 'New Service Request: General Inquiry' form. The form has several fields: 'Service Request Owner', 'Service Request Number', 'Contact Name', 'Organization Name', 'Program', 'Program Topic', 'Funding Application', 'Award', and 'Validated'. The 'Program' field is a dropdown menu with 'Capital Magnet Fund' selected, highlighted with a red circle. The 'Award' field is a text input with 'AWD-000' entered, highlighted with a red circle. The 'Validated' field is a dropdown menu with '--None--' selected.

- 4) Enter a short description of your question(s) in the “Subject” field. Please include more detail on your question(s) in the “Description” field. When you are done, press “Save.”

New Service Request: General Inquiry

Additional Information

*Status: New
[View all dependencies](#)

*Service Request Origin: Web

Priority: Medium

Description Information

*Subject: Short question(s) description

*Description: Detailed description of any questions.

Buttons: Cancel, Save & New, **Save**

- 5) The CMF Team will receive a notification of your Service Request and will work to provide answers to your question via the Service Request in a timely manner. You will receive an email when a member of the CMF Team responds to your Service Request.
- 6) You can view any Service Request you have open by selecting “My Open Service Requests (Ext)” from the drop-down menu on the Service Request tab.

Home Organizations Allocations Contacts Service Areas **Service Requests**

Service Requests

My Open Service Requests (Ext) ▼

1 item • LIST VIEWS

- My Open Service Requests (Ext)**
- My Service Requests (Ext)
- Recently Viewed (Pinned list)
- Recently Viewed Service Requests

Status	Priority
In Progress	Medium

- 7) Communication with CDFI Fund staff can be viewed on the the “Related” tab. You can add additional comments to the Service Request by clicking “New” or add attachments by clicking “Upload Files”

Priority
Medium

Status
In Progress

Service Request Number

Detail

Related

Service Request Comments Public (1)

New

User	Public	Created Date	Comment
			<div></div> <div>Kind regards, The CMF Program Team</div>

View All

Attachments (0)

Upload Files

Appendix A – Authorized Representative Acceptable Titles

The Assistance Agreement (AA) must be signed by an Authorized Representative (AR) with an acceptable title. This designated Authorized Representative must be duly authorized by your organization to enter into legally binding documents on behalf of your organization. As such, consultants, are not bona fide Authorized Representatives and thus cannot execute Assistance Agreements on behalf of their client organizations (i.e., the Recipient). The “Auth. Rep. Signature Title”, which is the title reflected on the Authorized Representative’s contact record in AMIS, must reflect the title of a leadership position and the authority to sign legally binding documents on behalf of the organization.² The table below details acceptable AR titles and questionable AR titles:

Acceptable AR Titles	Questionable AR Titles
<ul style="list-style-type: none">• Chief Executive Officer• Chief Financial Officer• Chief Operating Officer• President/Vice President• Partner (Venture Capital Funds)• Compliance Manager/Supervisor or any Manager/Supervisor related position• Senior Accountant or any senior-level title• Director• Board Officer• Any C-Suite position• Board Chair• Chairman• Chairperson• Vice Chair (Vice Chairman, Vice Chairperson)• Treasurer• Board Secretary• Manager• Any similar titles that reflect the incumbent authority within the organization	<ul style="list-style-type: none">• Assistant/Executive Assistant• Secretary/Receptionist• Loan Officer• Community Development Officer• Intern• Analyst• Consultant (not allowed to sign on behalf of an organization)• Board Member• Associate Treasurer• Associate Director• Secretary• Comptroller• Controller• Staff Accountant• Authorized Representative

IMPORTANT: Please **DO NOT** complete any of the Assistance Agreement signature checkboxes if you do not have the authority to sign legal documents on behalf of your organization. Doing so may significantly delay the CDFI Fund in finalizing your organization’s Assistance Agreement and initiating the award payment process.

² To add or update organization contacts see Section 6.3 of the [AMIS Training Manual](#).